

Private Provider Face to Face Case Recordings Web Application

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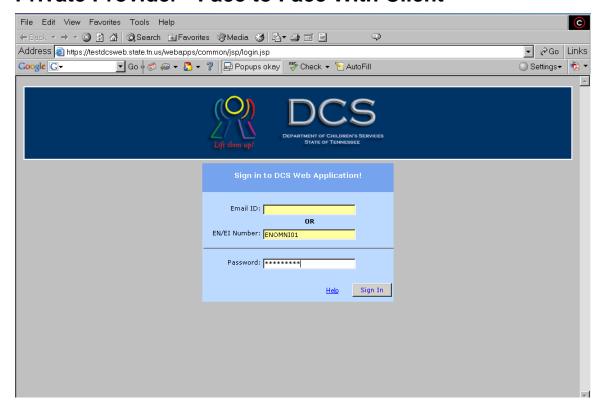
Overview

The purpose of the private provider case recording web application is to provide an effective and reliable method for users to document private provider face-to-face case recordings in TNKids. Private providers are non-DCS employees, thus do not have direct access to the TNKids application to document their case recordings.

On July 19, 2006 OIS presented several options for delivery of a quick solution to the project stakeholders. Stakeholders unanimously agreed that a web portal was the most feasible method for the private providers to document their own case recordings for DCS custodial clients. A major benefit to be gained from this web application is the elimination of the need for Family Service Workers to obtain private provider face-to-face meeting minutes and document them as private provider case notes.

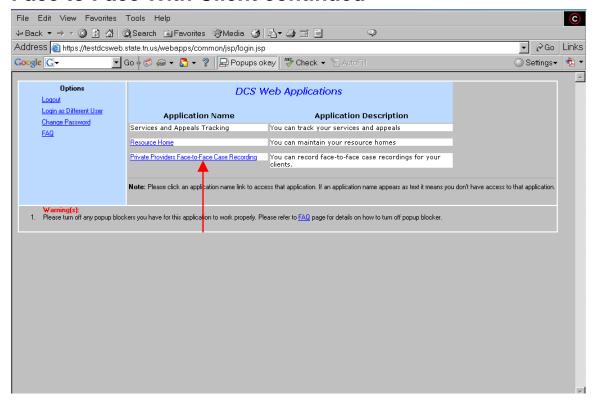
To better protect client's personal information recorded in TNKids, private providers will only be able to view & access basic information on clients and the client's case recordings, that the provider has an active association and client's placement de-authorization date is less than or equal to sixty (60) days from the face to face occurred date. In other words, if a private provider does not provide any services to a particular TNKids custodial client or had a service association from the client's placement de-authorization greater than sixty (60) days from the face to face occurred date, then the private provider will not be able to access that client's information in the Private Provider F2F Web Application to document a case note.

Private Provider - Face to Face With Client



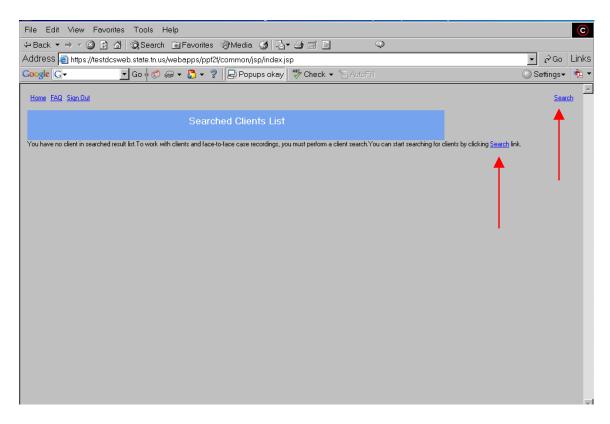
The user will be assigned an EN number and password to log into the Provider Face-to-Face web application. After entering the information, the user will click on the "Sign In" button to continue. The "Web Application Access & Training Request" form must be completed and submitted to the Child Placement & Private Providers Unit in order for a provider staff to receive access to the application

Face to Face With Client continued



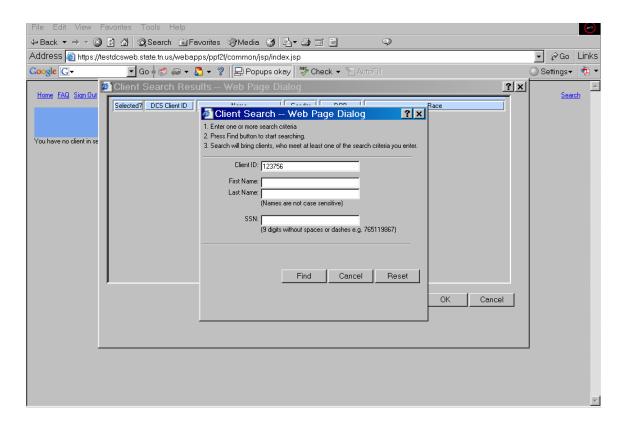
The user will click on the "Private Providers Face-to-Face Case Recording" link.

Face to Face with Client Search Link



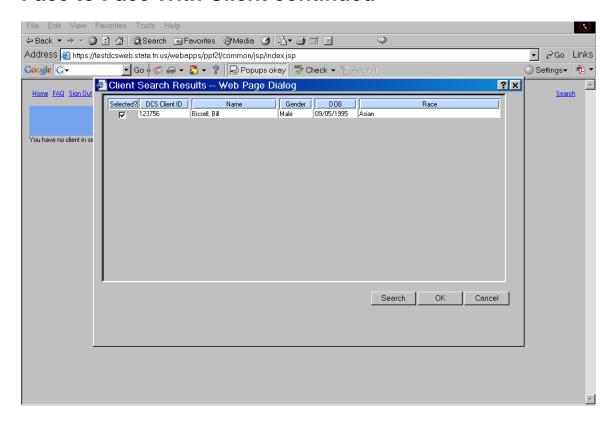
The user will click on either of the two "Search" links on the upper right hand side of the screen.

Face to Face With Client continued



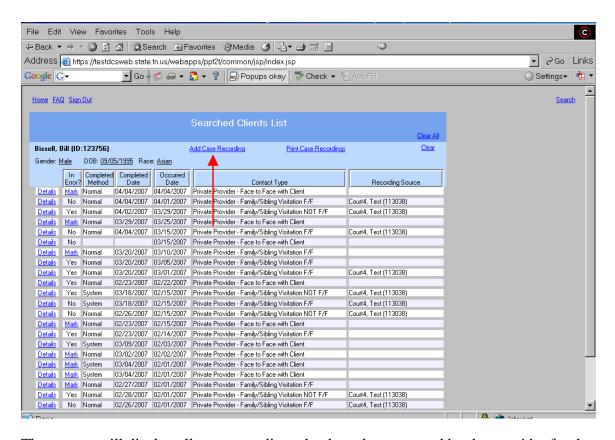
The user will enter the search criteria. The user may search by first name, last name, SSN and/or Client ID. The user will click "Find" to continue.

Face to Face With Client continued



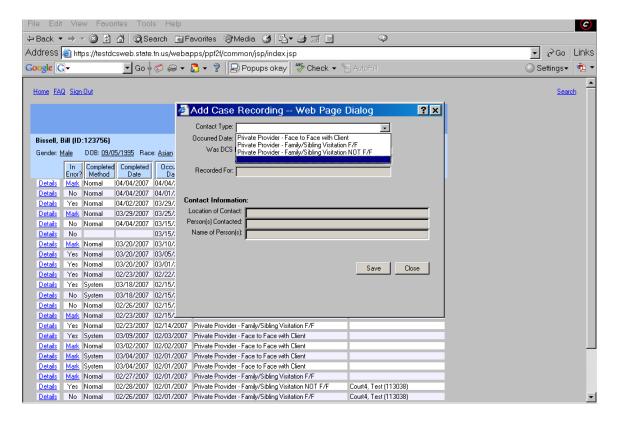
To select a result from the search the user will click on the check box next to the client they wish to select and click "OK". If the user wishes to search again using different search criteria then the user will click on "Search" to repeat the search.

Face to Face With Client continued



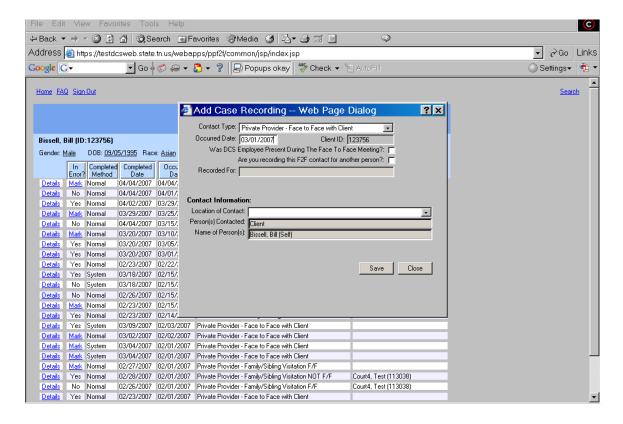
The system will display all case recordings that have been entered by the provider for the selected client(s). To add a case recording, the user will click on the "Add Case Recording" link.

Face to Face With Client Contact Type



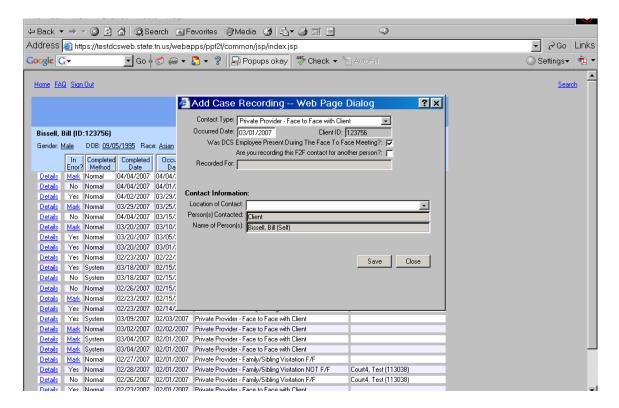
The user will select Private Provider - Face to Face with Client. Other choices listed are, Private Provider – Family/Sibling visitation F/F and Private Provider – Family/Sibling Visitation NOT F/F. These will be discussed later.

Face to Face With Client Occurred Date



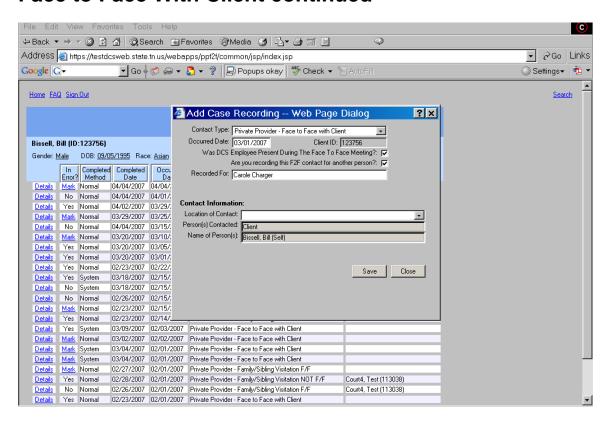
The user will enter the "Occurred Date". The "Occurred Date" is the date the visit actual took place.

Face to Face With Client continued



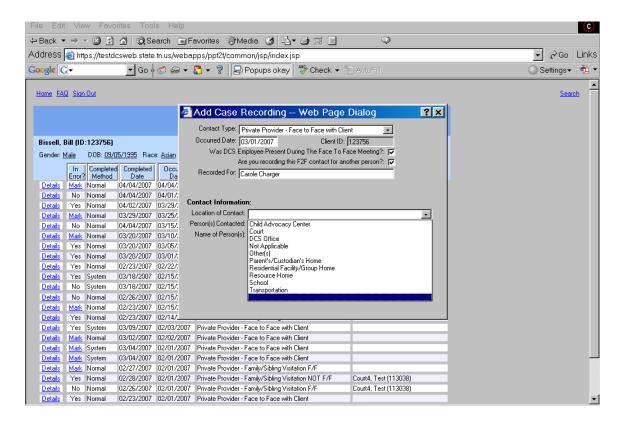
The user will answer the question, "Was DCS Employee Present During The Face To Face Meeting"? If the worker was present, the user will click on the check box next to the question. If the worker was not present, then the user will leave the check box blank.

Face to Face With Client continued



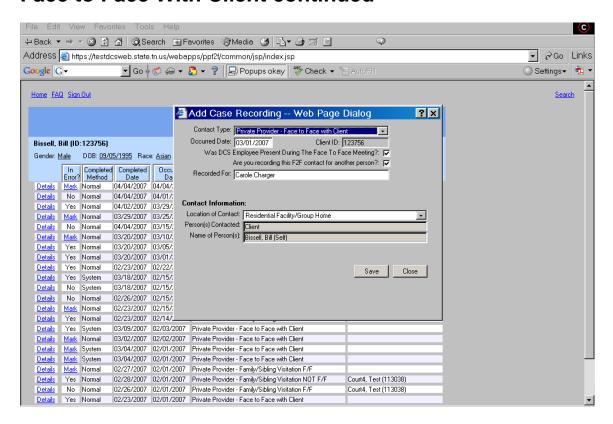
The user will answer the question, "Are you recording this F2F contact for another person?" If the user is entering the case recording for another person then the user will click on the check box next to the question. The user will also record the name of the person who was present at the F2F meeting in the first name last name format.

Face to Face With Client Location of Contact



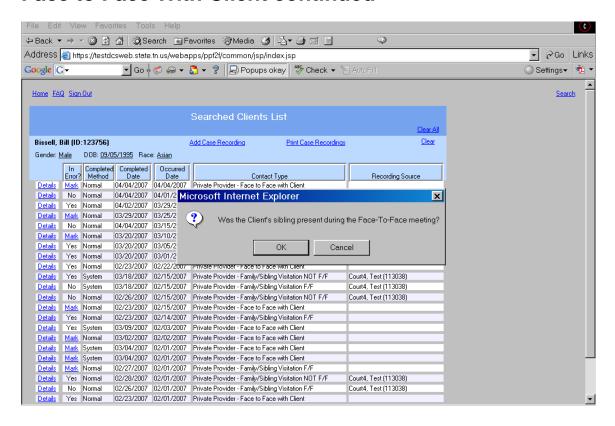
The user will select the correct "Location of Contact" from the dropdown list. The locations listed are: Child Advocacy Center, Court, DCS Office, Not Applicable, Other(s), Parent's/Custodian's Home, Residential Facility/Group Home, Resource Home, School and Transportation. Providers are **NOT** to select "Not Applicable" when recording the "Location of Contact".

Face to Face With Client continued



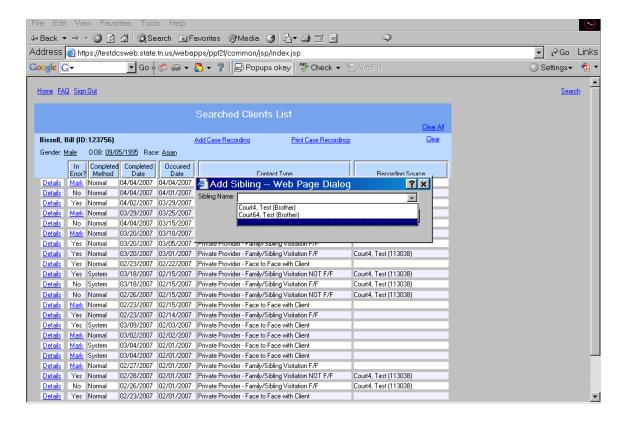
When the user selects the contact type of "Private Provider – Face to Face with Client", the system will automatically populate the "Person(s) Contacted" and "Name of Person(s)" fields. The user will click "Save" to continue.

Face to Face With Client continued



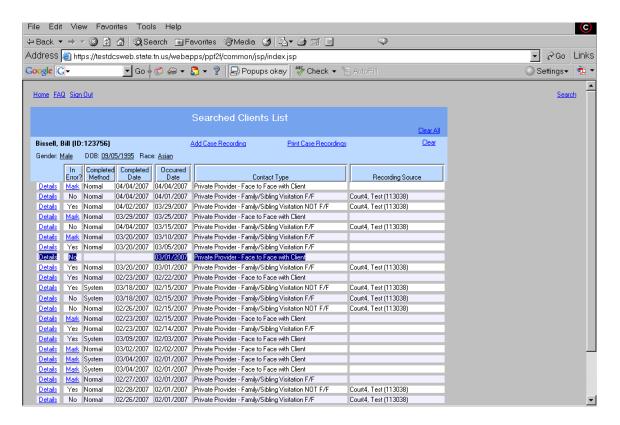
If the client has a sibling client, the system will prompt the user with the question, "Was the client's sibling present during the Face – to Face Meeting?" If a sibling was present, the user will select "OK". If no sibling was present, the user will select "Cancel". In this example the user will select "OK".

Face to Face With Client continued



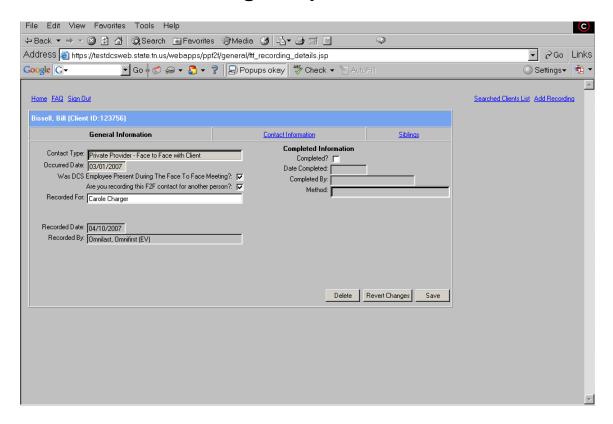
When the user selects "OK' the system will provide a dropdown list of the client's sibling(s). By choosing the sibling(s), the system will automatically add the same case recording to the sibling's record. The user will select the correct sibling and click "Save" to continue. If more than one sibling were present, the user will choose one sibling here and add the other sibling(s) present on the Siblings tab before completing the case recording.

Details Link



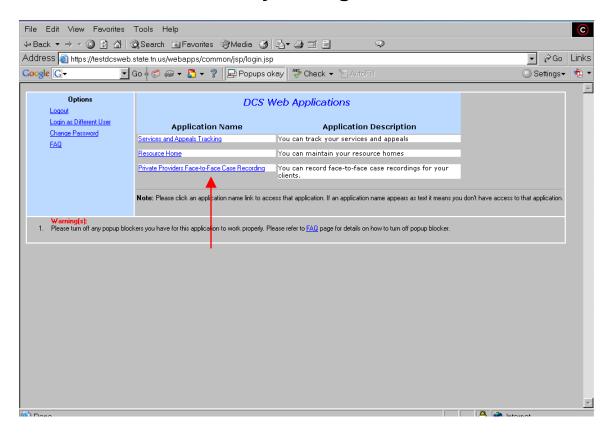
The system will save the information to the client's record. The new recording will be listed in descending order by the "Occurred Date'. To continue the user will click on the "<u>Details</u>" link to the left of the new recording.

Mark a Case Recording Completed



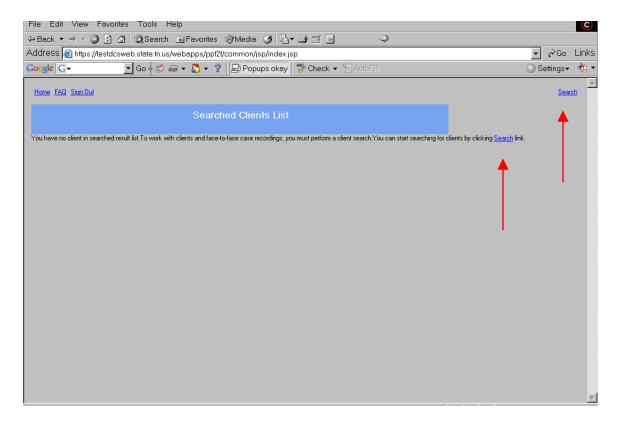
The system will then display all of the information the user has entered. If all of the information is correct the user will click the "Completed?" check box and the system will automatically populate the Date Completed, Completed By and Method fields. If any of the grayed out information is incorrect, the user will need to select "Delete" and start over again.

Private Provider – Family/Sibling Visitation Face to Face



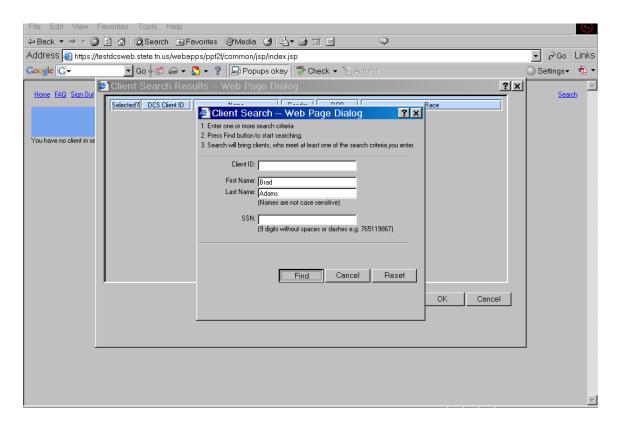
The user will click on the "Private Providers Face-to-Face Case Recording" link.

Private Provider – Family/Sibling Visitation Face to Face continued



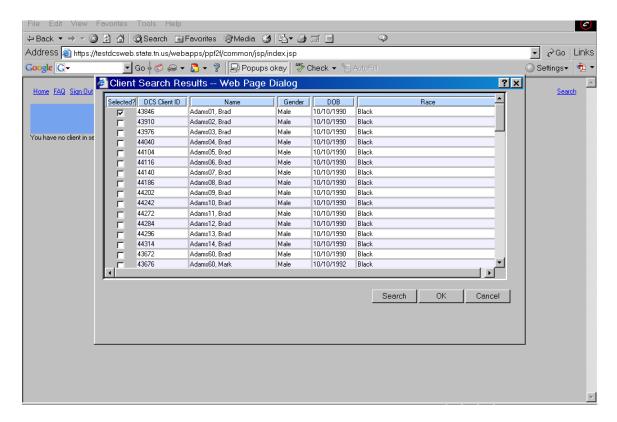
The user will click on either of the two "Search" links on the upper right hand side of the screen.

Client Search



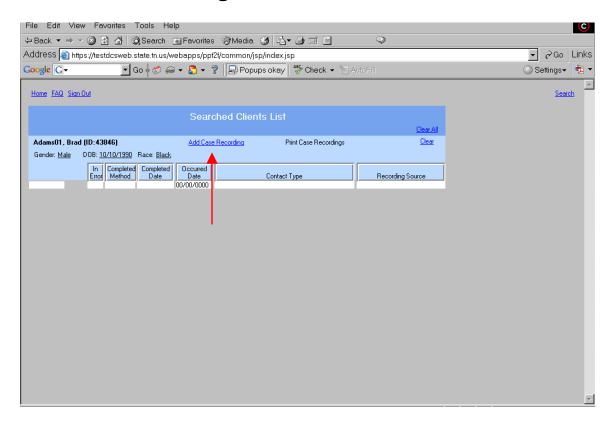
The user will enter the search criteria. The user may search by first name, last name, SSN and/or Client ID. The user will click "Find" to continue.

Client Search continued



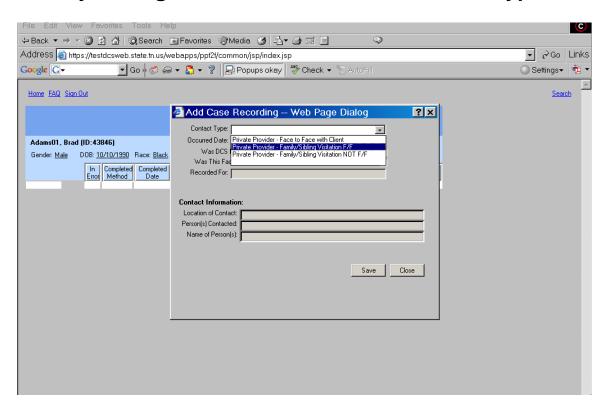
To select a result from the search, the user will click on the check box next to the client they wish to select and click "OK". If the user wishes to search again using different search criteria then the user will click on "Search" to repeat the search.

Add Case Recording Link



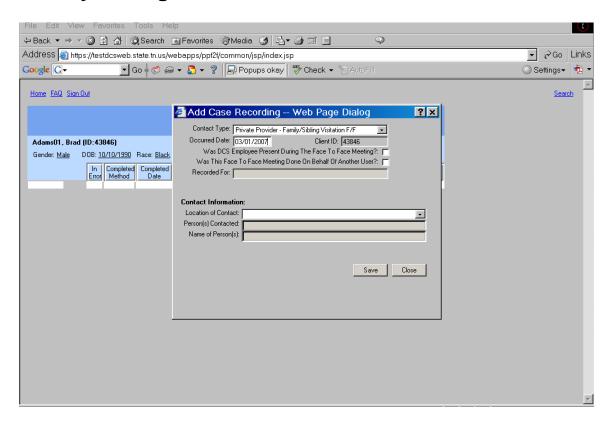
The system will display all case recordings that have been entered by the provider for the selected client(s). To add a case recording, the user will click on the "Add Case Recording" link.

Family/Sibling Visitation Face to Face Contact Type



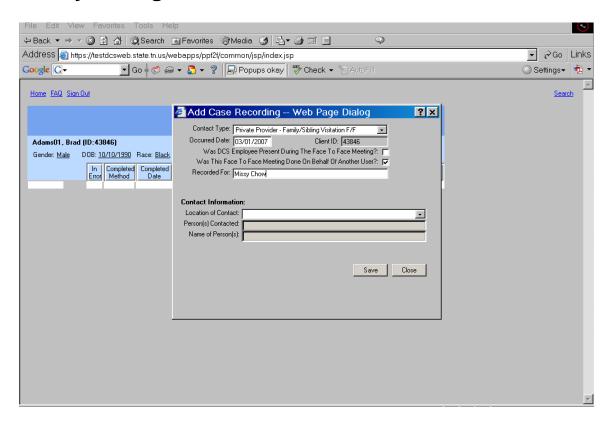
The user will select Private Provider -Family/Sibling Visitation F/F. Other choices listed are, Private Provider –Face to Face with Client and Private Provider – Family/Sibling Visitation NOT F/F.

Family/Sibling Visitation Face to Face Occurred Date



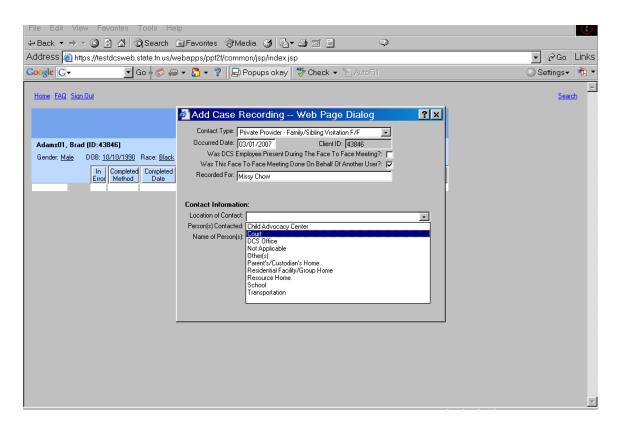
The user will enter the "Occurred Date".

Family/Sibling Visitation Face to Face Recorded For



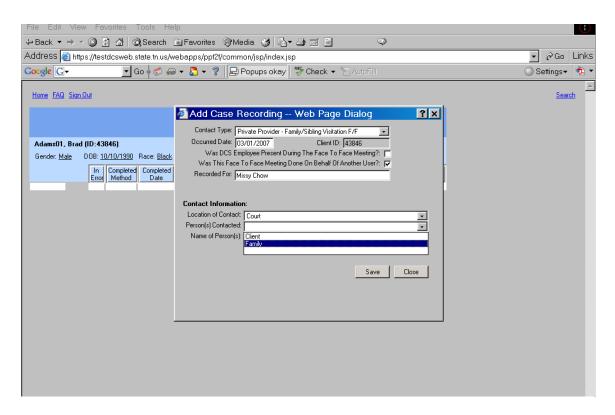
The user will answer the questions, "Was DCS Employee Present During The Face To Face Meeting"? and "Was This Face To Face Meeting Done On Behalf Of Another User"? The user will also enter the name of the person who made the Face to Face if appropriate, first name first.

Family/Sibling Visitation Face to Face Location of Contact



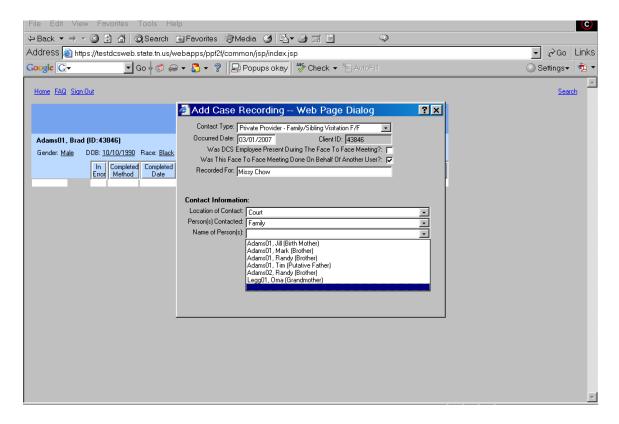
The user will select the correct "Location of Contact" from the dropdown list. The locations listed are: Child Advocacy Center, Court, DCS Office, Not Applicable, Other(s), Parent's/Custodian's Home, Residential Facility/Group Home, Resource Home, School and Transportation. Providers are **NOT** to select "Not Applicable" when recording the "Location of Contact".

Family/Sibling Visitation Face to Face Persons Contacted



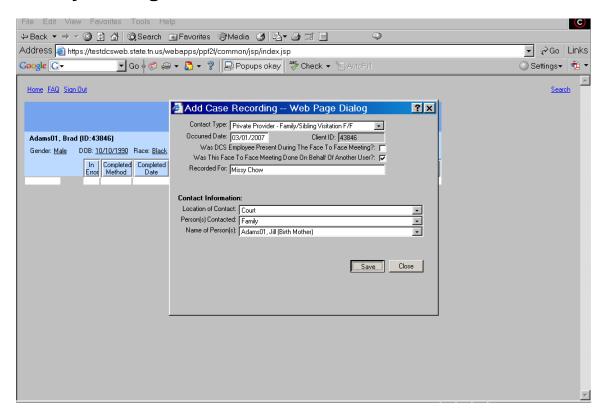
The user will select the correct "Person(s) Contacted". This recording is for a Family/Sibling visitation so the user will select "Family".

Family/Sibling Visitation Face to Face Name of Person(s)



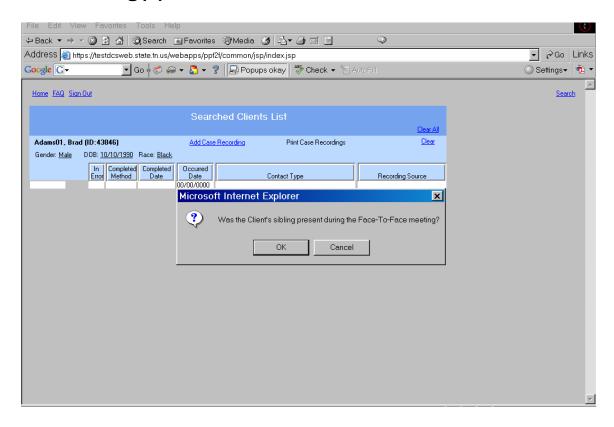
The user will select the "Name of Person" who was at the meeting from the dropdown list. If a family member's name is not displayed in the case, then the user will need to contact the DCS case manager to have the family member added to TNKids. Only family member are to be recorded in the case recording.

Family/Sibling Visitation Face to Face continued



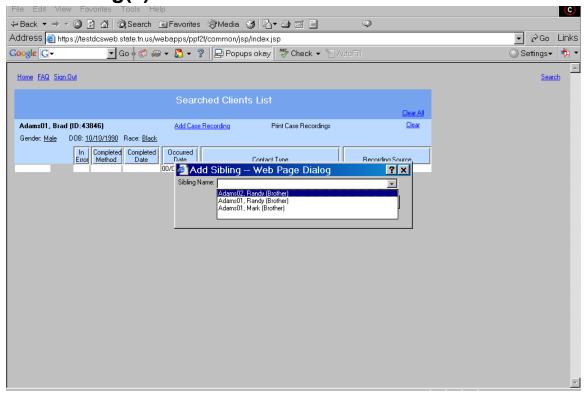
The user will click "Save" to continue.

Add Sibling(s)



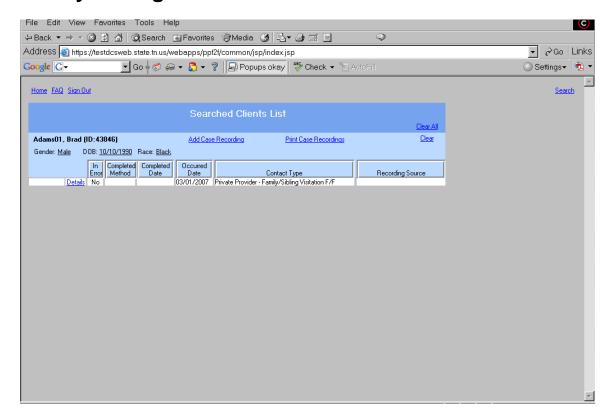
If the client has sibling clients, the system will prompt the user with the question, "Was the client's sibling present during the Face – to Face Meeting?" If a sibling was present, the user will select "OK". If no sibling was present, the user will select "Cancel". In this example the user will select "OK".

Add Sibling(s) continued



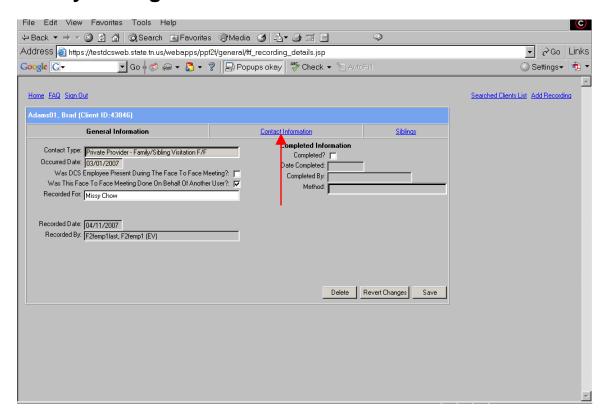
When the user selects "OK' the system will provide a dropdown list of the client's sibling(s). By choosing the sibling(s), the system will automatically add the same case recording to the siblings record. The user will select the correct sibling and click "Save" to continue. If other siblings were present, they will be added using the Siblings tab before the case recording is completed.

Family/Sibling Visitation Face to Face continued



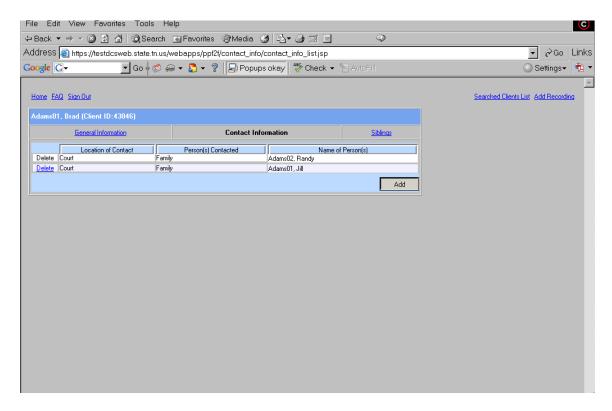
The system will save the information to the client's record. The new recording will be listed in descending order by the "Occurred Date'. To continue the user will click on the "Details" link to the left of the new recording.

Family/Sibling Visitation Face to Face continued



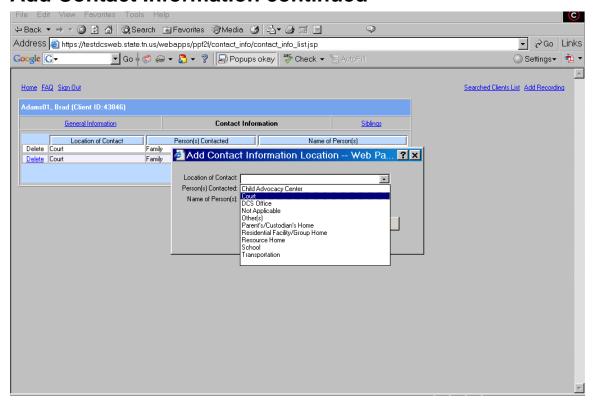
The system will then display all of the information the user has entered. To add more names of person(s) contacted click on the "Contact Information" link.

Add Contact Information



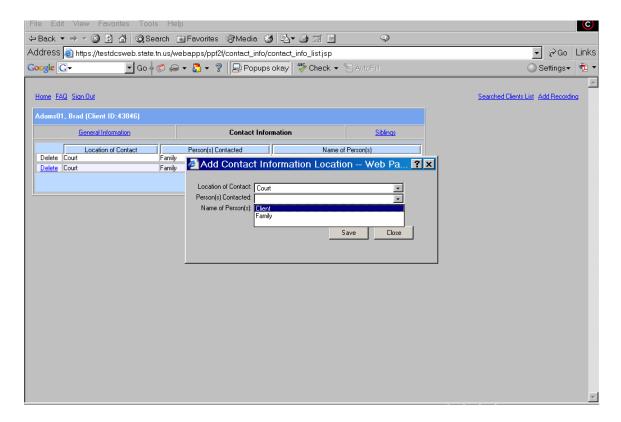
To add family members to the contact link, the user will click on the "Add" button.

Add Contact Information continued



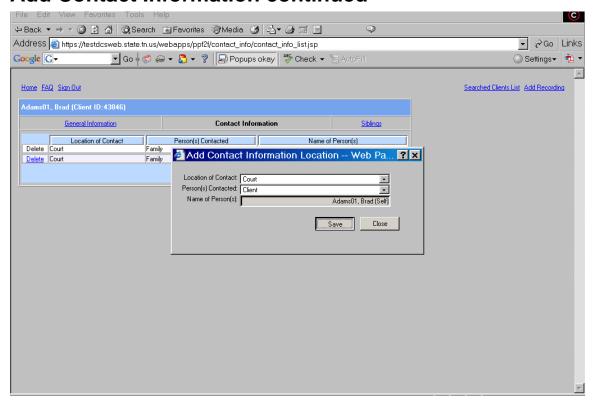
The user will select the correct "Location of Contact" from the dropdown list.

Add Contact Information continued



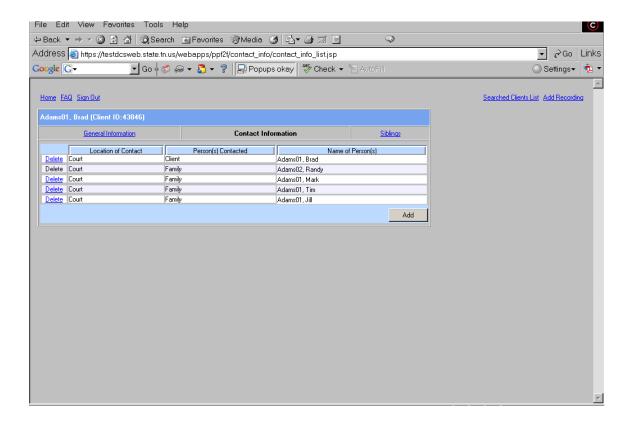
The user will select the correct "Person(s) Contacted". In this example the user is adding the client.

Add Contact Information continued



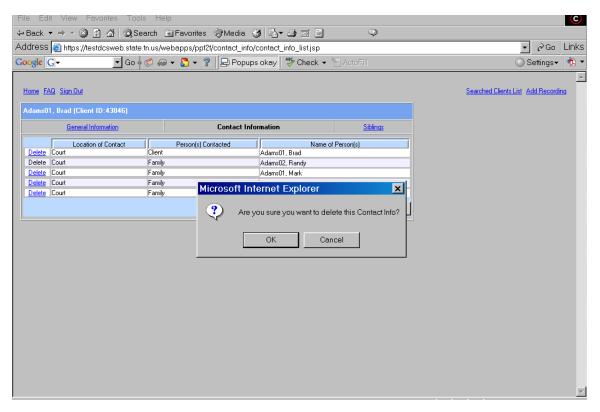
When the user selects "Client" in the "Person(s) Contacted" field, the system with auto populate the "Name of Person(s)" field. The user will click on "Save" to continue.

Delete Contact Information



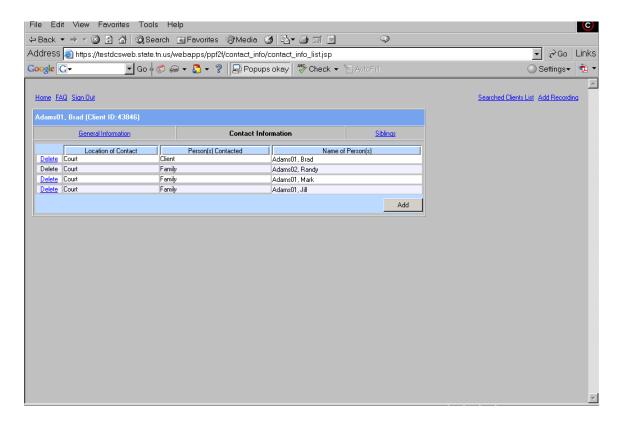
If wrong person is added by mistake, the user will click on the "Delete" link to the left of the name of the person to be removed from the contact information list. For this example the user is deleting Tim Adams01.

Delete Contact Information continued



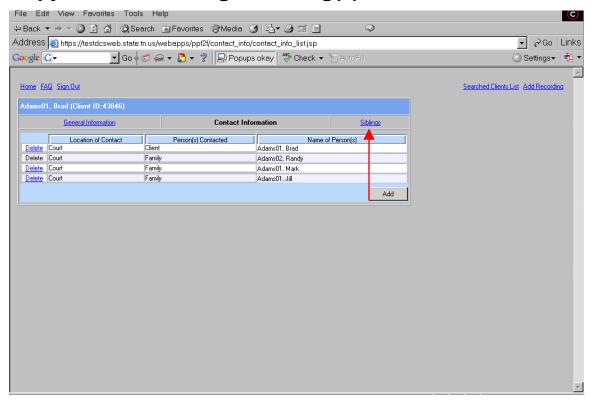
The user will be prompted to insure the selected person is to be deleted. The user will click "OK" if the person selected is correct.

Delete Contact Information continued



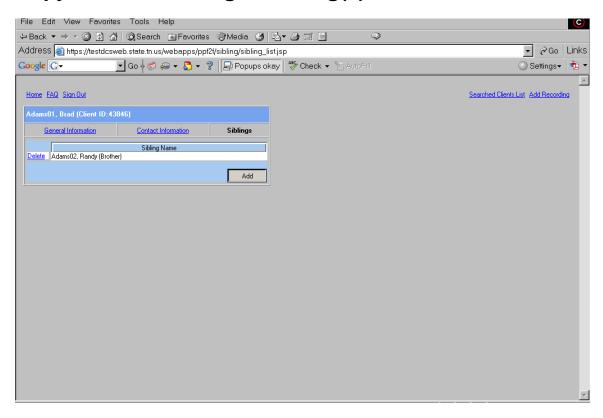
The system will then refresh the screen to show that Tim Adams01 has been removed.

Copy Case Recording to Sibling(s) Record



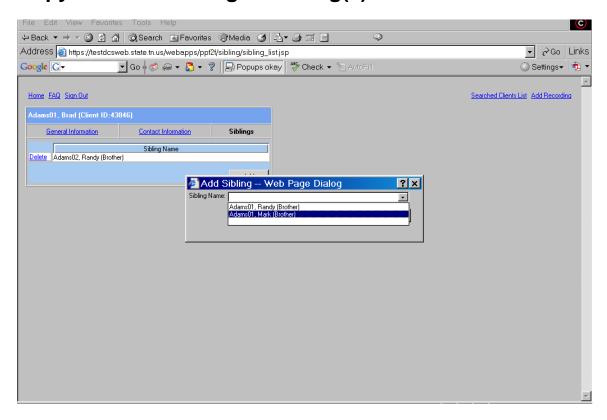
To copy a case recording to sibling TNKids record(s), click on the "Siblings" link. The sibling(s) does not have to be placed with the vendor.

Copy Case Recording to Sibling(s) Record continued



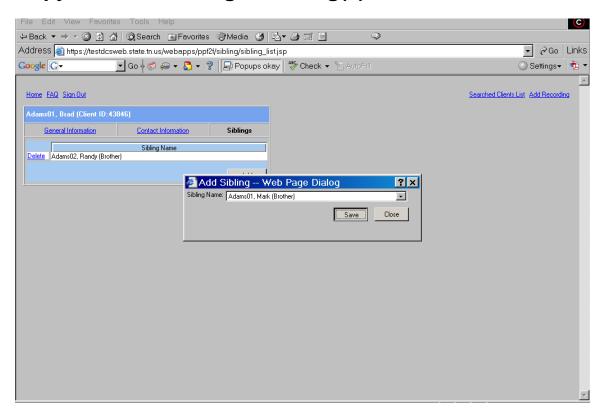
To copy the case recording to a sibling(s) TNKids record the user will click on the "Add" button.

Copy Case Recording to Sibling(s) Record continued



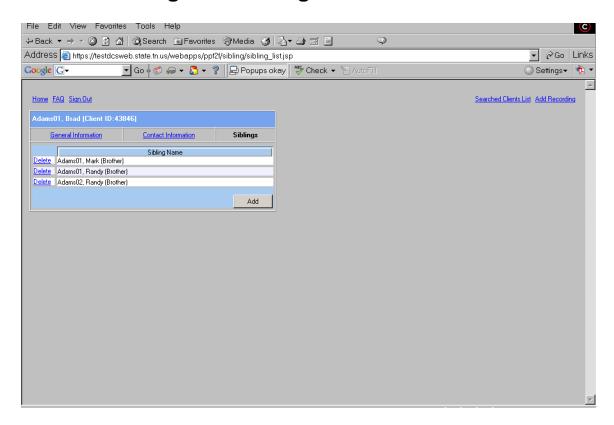
The user will select the correct sibling from the dropdown list.

Copy Case Recording to Sibling(s) Record continued



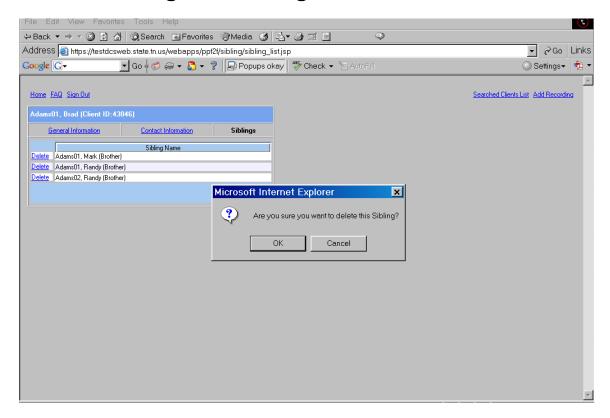
The user will click "Save" to continue. To copy the case recording to more than one sibling's TNKids record, the user will repeat the same process. If a client's sibling(s) is missing from the list and the sibling is also a client of DCS then the user will need to contact the DCS case manager to have the sibling(s) added to the TNKids record.

Delete a Sibling from Siblings Link



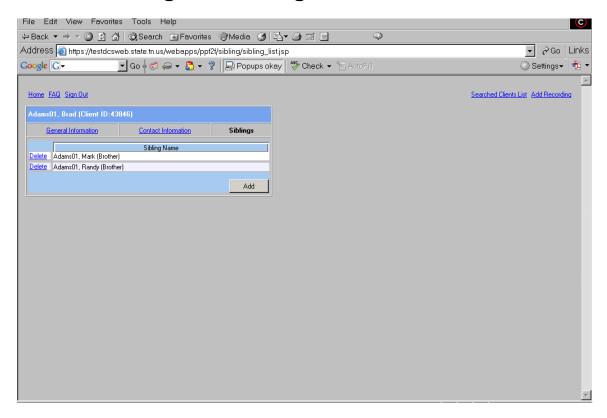
To remove a sibling from the "Siblings" link the user will click on the "Delete" link to the left of the person's name they wish to remove.

Delete a Sibling from Siblings Link continued



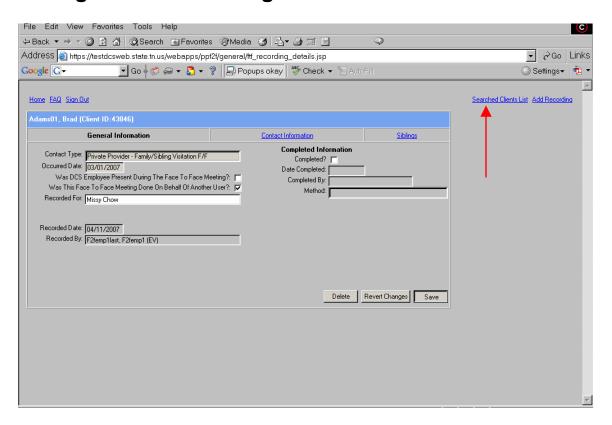
The system will prompt the user to make sure the user wishes to continue to delete the sibling. The user will select "OK" to continue.

Delete a Sibling from Siblings Link continued



The selected sibling is removed from the "Siblings" link and the case recording will not be copied to that sibling's TNKids record.

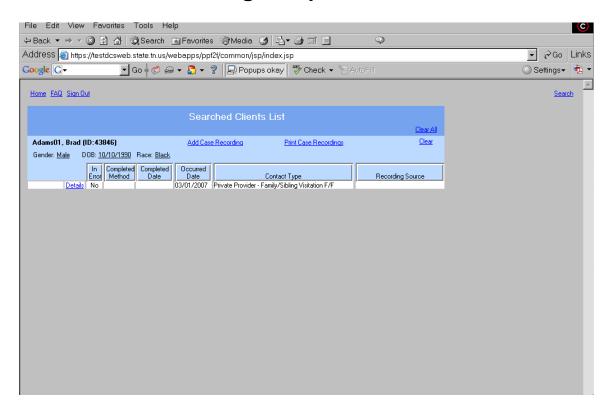
Saving a Case Recording



The user may leave and return to the incomplete case recording later by clicking "Save". If the user doesn't mark the recording as completed within 30 days of the occurred date, then the system will auto complete the case recording as an incomplete recording and it will also be "Marked In Error" in client's record.

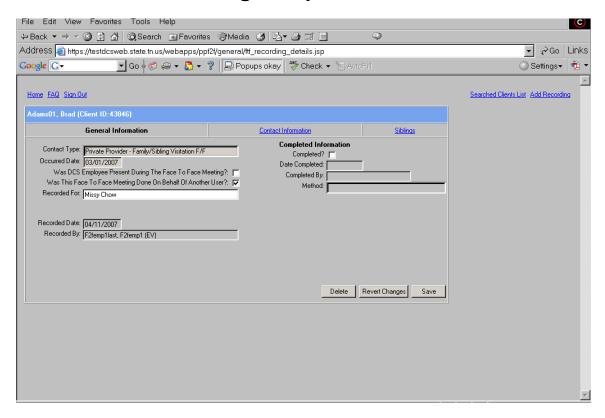
To return to the list of client(s) initially searched for and chosen, the user will click on the "Searched Clients List" link on the upper right side of the screen.

Mark a Case Recording Completed



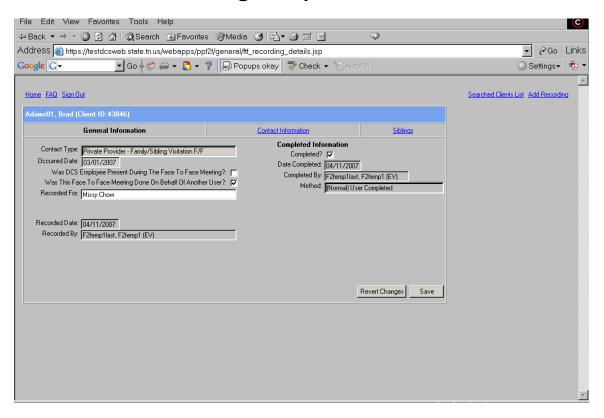
The client's incomplete case recording is now listed. To finish the recording and mark it as completed, the user will click on the "Details" link to the left of the incomplete case recording. All case recordings must be completed within 30 days from the occurred date or the system will complete the recording automatically and mark "In Error".

Mark a Case Recording Completed continued



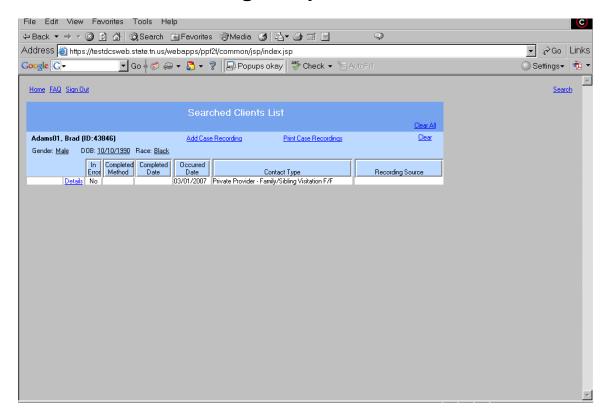
To mark a case recording as completed the user will click on the check box next to the "Completed?" question.

Mark a Case Recording Completed continued



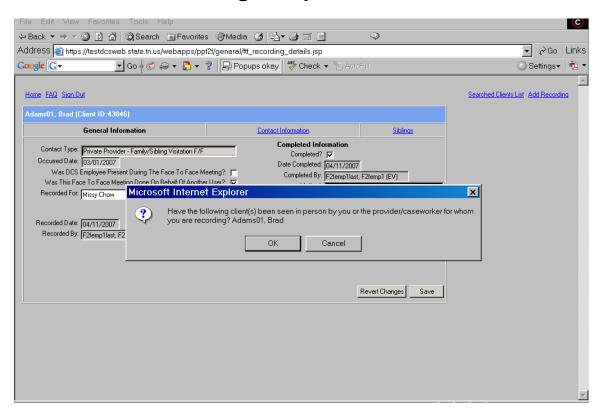
The system will auto complete the "Date Completed", "Completed By" and "Method" fields. The user must click "Save" to continue and complete the process.

Mark a Case Recording Completed continued



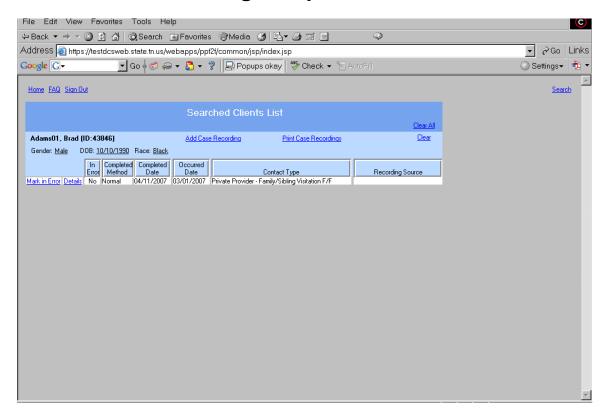
If the user fails to click "Save" after marking a case recording completed the information will be lost and the user must repeat the process.

Mark a Case Recording Completed continued



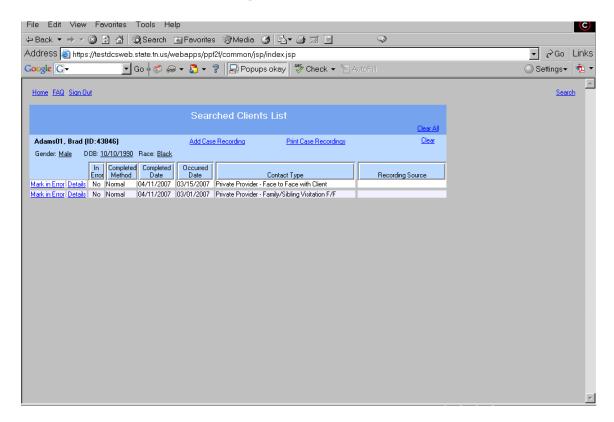
After the user clicks "Save" the system will prompt the user to acknowledge they or the person they are recording for saw the client. If this is correct the user will click "OK" to continue.

Mark a Case Recording Completed continued



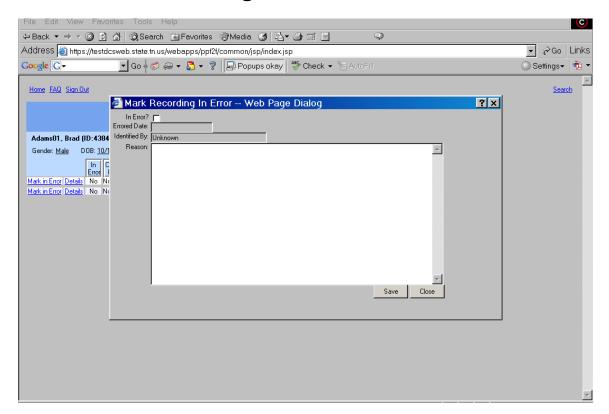
The system will refresh and display the newly completed case recording.

Mark a Case Recording In Error



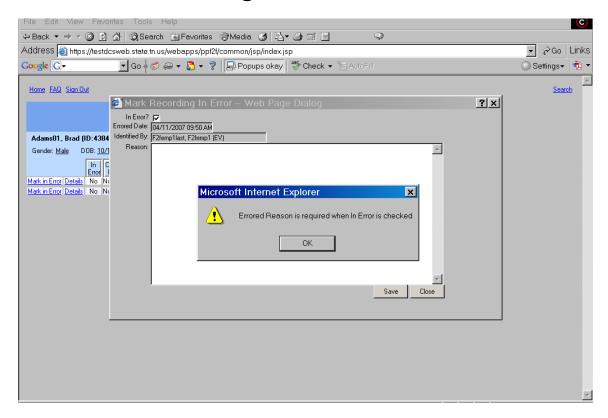
If the user has entered a case recording into the wrong record, the information is incorrect or later is told the Face to Face never took place, the user must mark it as In Error. To mark a recording In Error, the user will click on the "Mark In Error" link to the left of the incorrect case recording.

Mark a Case Recording In Error continued



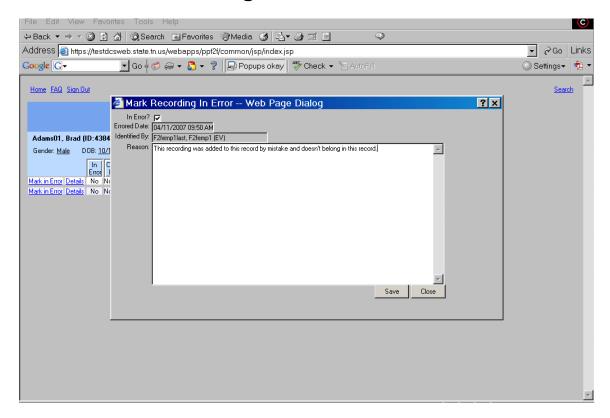
The user must click on the "In Error?" check box and also enter a reason why the recording is in error.

Mark a Case Recording In Error continued



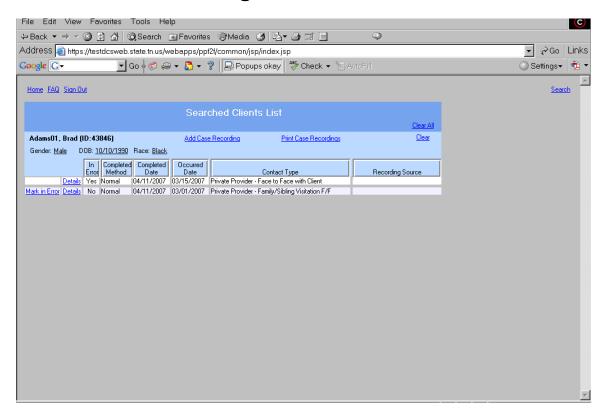
If user attempts to save without entering a reason, the system will prompt the user with an error. The user will click "OK" to continue.

Mark a Case Recording In Error continued



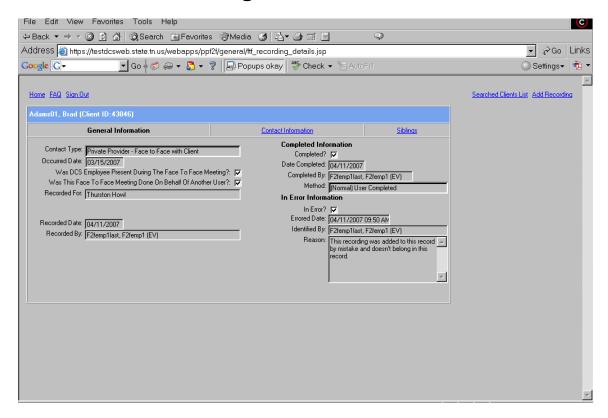
The user will enter a reason why the case recording is to be marked "In Error" and then click "Save".

Mark a Case Recording In Error continued



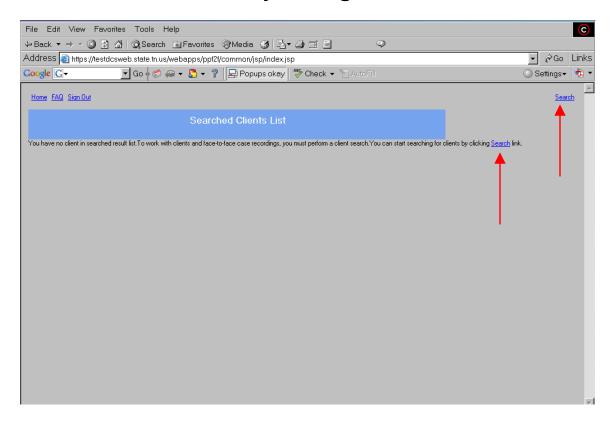
After the recording is marked in error, the word "Yes" will be displayed in the "In Error" column next to the incorrect case recording.

Mark a Case Recording In Error continued



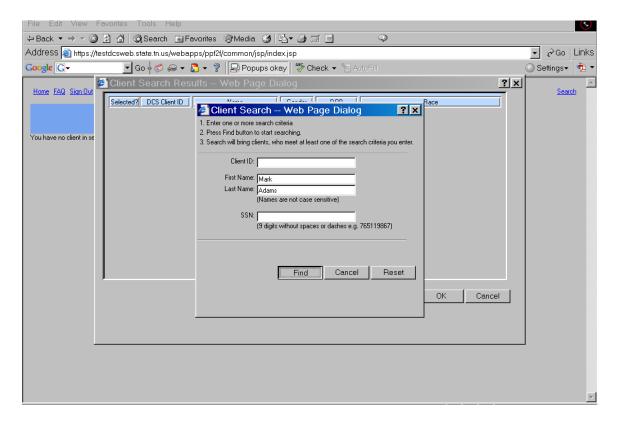
After a case recording is marked "In Error" it can't be reversed.

Private Provider – Family/Sibling Visitation Not F/F



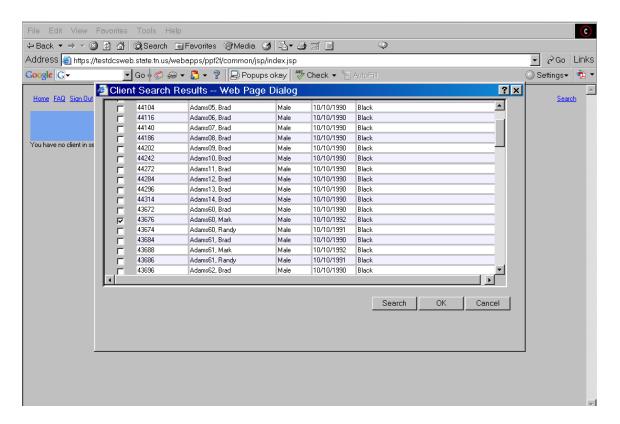
The user will click on either of the two "Search" links on the upper right hand side of the screen.

Client Search



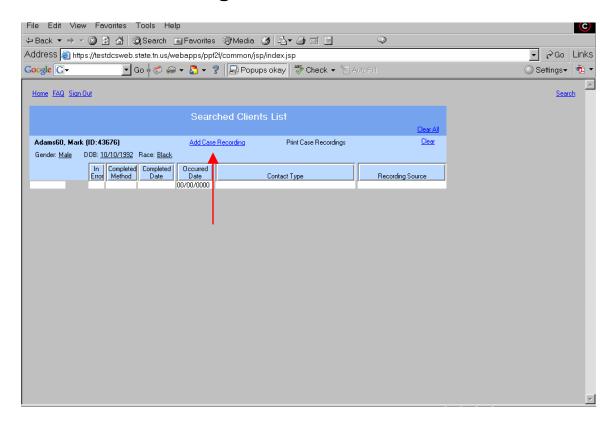
The user will enter the search criteria. The user may search by first name, last name, SSN and/or Client ID. The user will click "Find" to continue.

Client Search continued



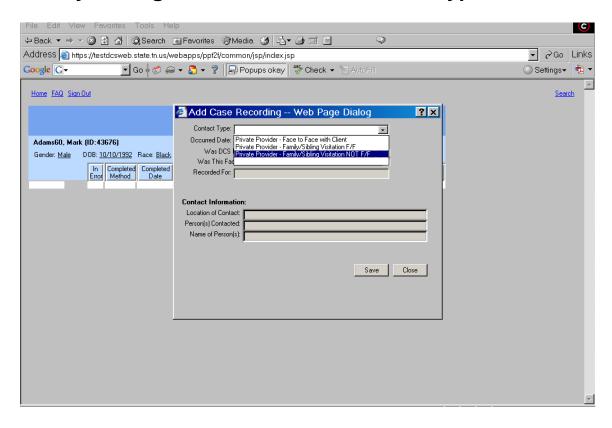
To select a result from the search, the user will click on the check box next to the client they wish to select and click "OK". If the user wishes to search again using different search criteria then the user will click on "Search" to repeat the search.

Add Case Recording Link



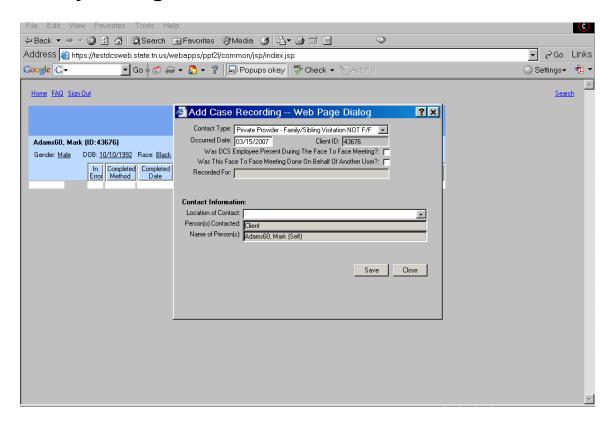
The system will display all case recordings that have been entered by the provider for the selected client(s). To add a case recording, the user will click on the "Add Case Recording" link.

Family/Sibling Visitation Not F/F Contact Type



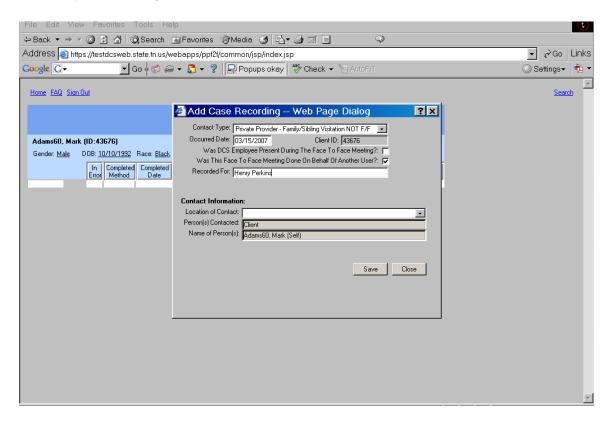
The user will select Private Provider -Family/Sibling Visitation NOT F/F. Other choices listed are, Private Provider –Face to Face with Client and Private Provider – Family/Sibling Visitation F/F.

Family/Sibling Visitation Not F/F Occurred Date



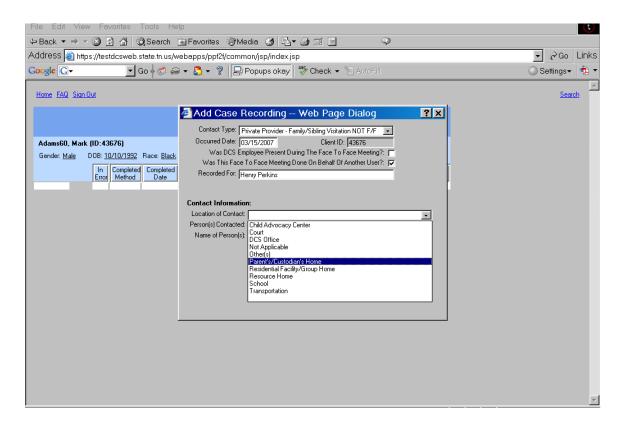
The user will enter the "Occurred Date".

Family/Sibling Visitation Not F/F Recorded For



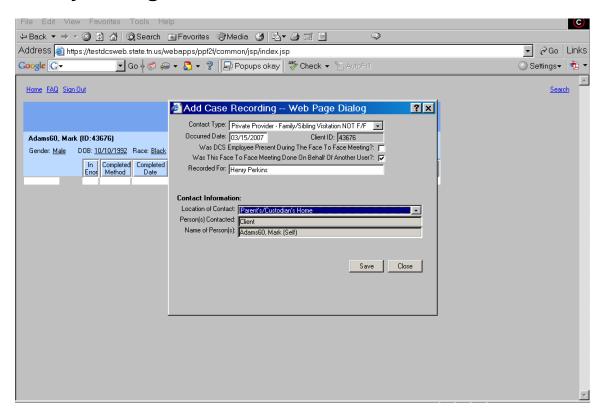
The user will answer the questions, "Was DCS Employee Present During The Face To Face Meeting"? and "Was This Face To Face Meeting Done On Behalf Of Another User"? The user will also enter the name of the person who made the Face to Face if appropriate, first name first.

Family/Sibling Visitation Not F/F Location of Contact



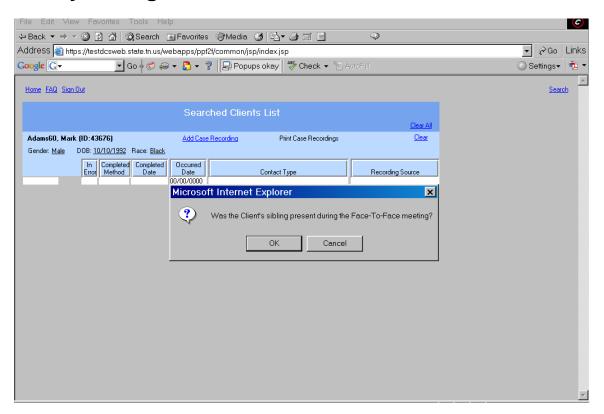
The user will select the correct "Location of Contact" from the dropdown list. The locations listed are: Child Advocacy Center, Court, DCS Office, Not Applicable, Other(s), Parent's/Custodian's Home, Residential Facility/Group Home, Resource Home, School and Transportation. Providers are **NOT** to select "Not Applicable" when recording the "Location of Contact".

Family/Sibling Visitation Not F/F continued



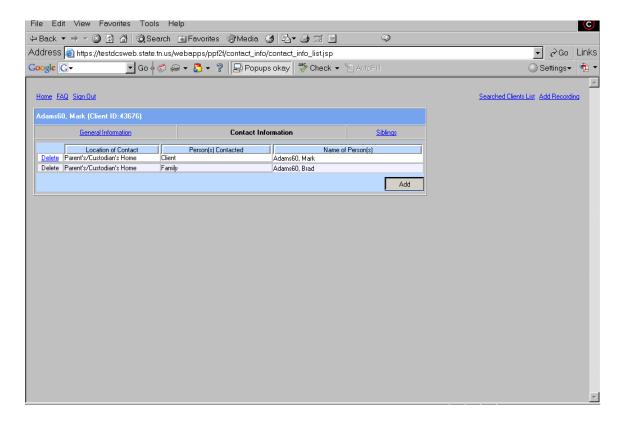
System will automatically fill in the "Person(s) Contacted" field with the client and the "Name of Person(s)" with the client's name. The user will click on "Save" to continue.

Family/Sibling Visitation Not F/F continued



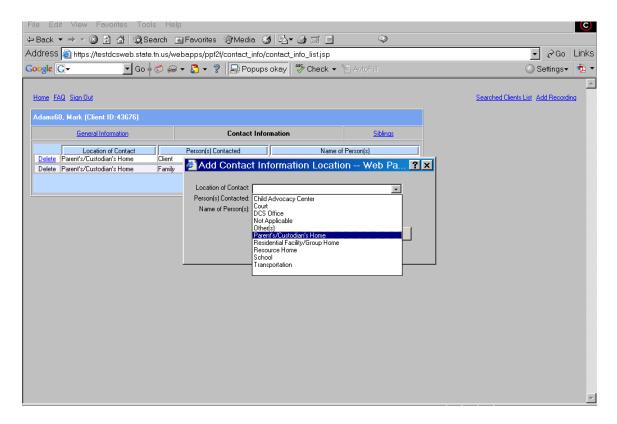
If the client has sibling clients, the system will prompt the user with the question, "Was the client's sibling present during the Face – to Face Meeting?" If a sibling was present, the user will select "OK". If no sibling was present, the user will select "Cancel". In this example the user will select "OK".

Add Contact Information



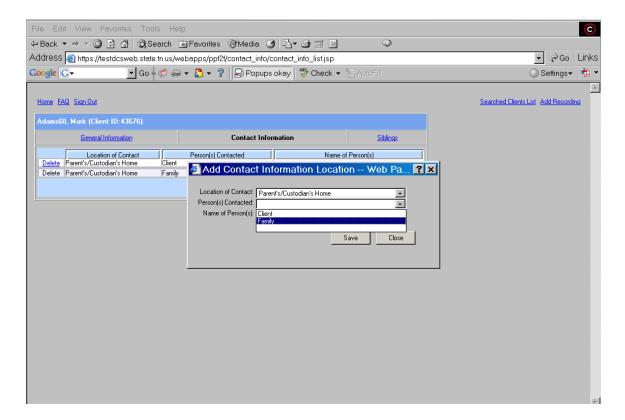
To add family members to the contact link the user will click on the "Add" button.

Add Contact Information continued



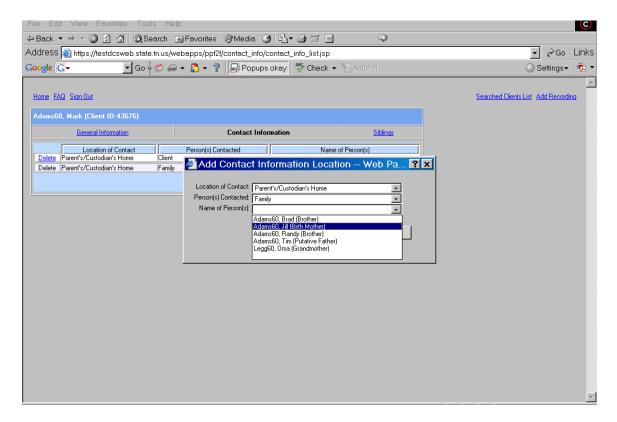
The user will select the correct "Location of Contact" from the dropdown list.

Add Contact Information continued



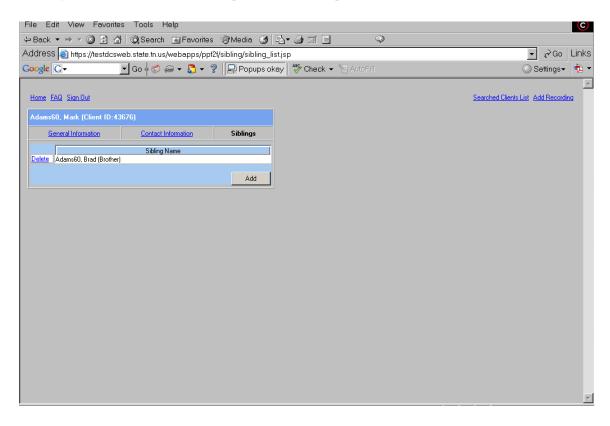
The user will select the correct "Person(s) Contacted". In this example the user is adding the mother, so Family is chosen.

Add Contact Information continued



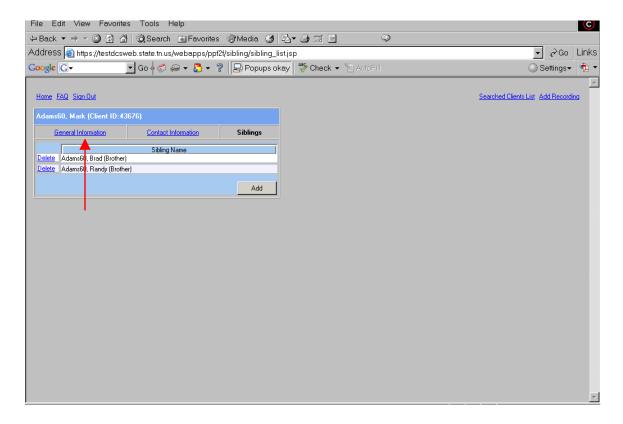
The user will select name of the correct person from the dropdown list.

Copy Case Recording to Sibling(s) Record



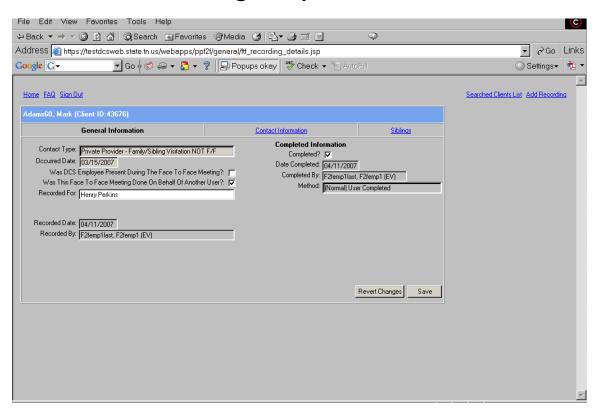
To copy the case recording to a sibling's TNKids record the user will click on the "Add" button.

General Information Link



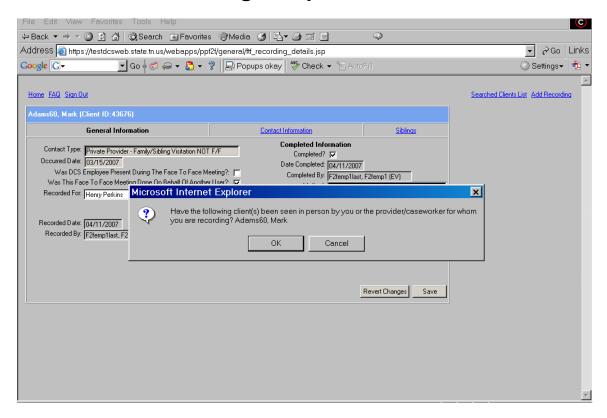
After the user has entered the sibling(s), the user will click on the "General Information" link to complete the recording.

Mark a Case Recording Completed



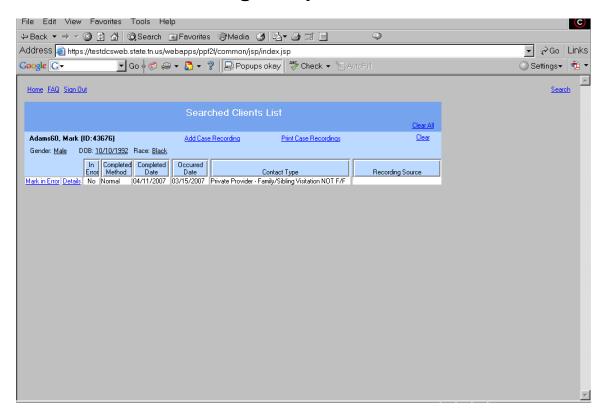
To mark a case recording as completed, the user will click on the check box next to the "Completed?" question. The system will auto complete the "Date Completed", "Completed By" and "Method" fields. The user must click "Save" to continue and complete the process.

Mark a Case Recording Completed continued



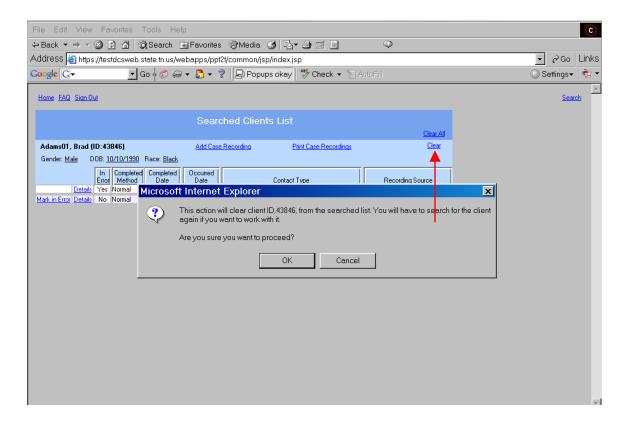
After the user clicks "Save" the system will prompt the user to acknowledge they or the person they are recording for saw the client. If this is correct the user will click "OK" to continue.

Mark a Case Recording Completed continued



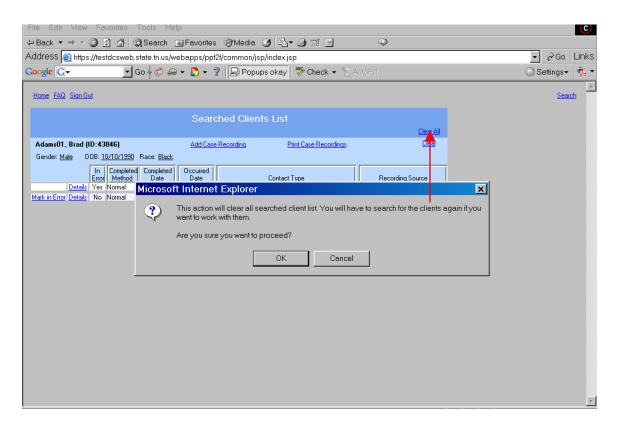
The system will refresh and display the newly completed case recording.

Clear Link



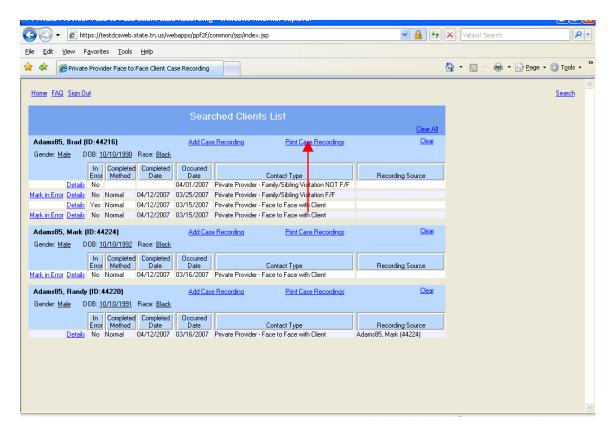
If the user clicks on the "Clear" link, the user will be prompted with the above message informing the user the client selected will be deleted from the screen. The user will click OK to continue.

Clear All Link



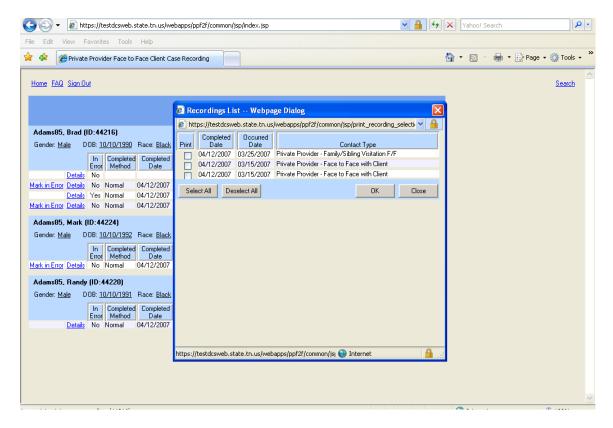
If the user clicks on the "Clear All" link the user will be prompted with the above prompt informing the user all of the searched clients will be deleted from the screen. The user will click OK to continue.

Print Case Recordings



To print case recordings, click on the "Print Case Recordings" link for the desired client.

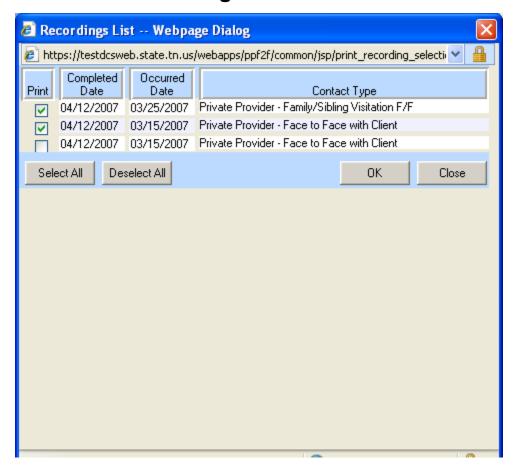
Print Case Recordings - continued



All case recordings that are available to print are displayed. Only completed recordings are available for printing.

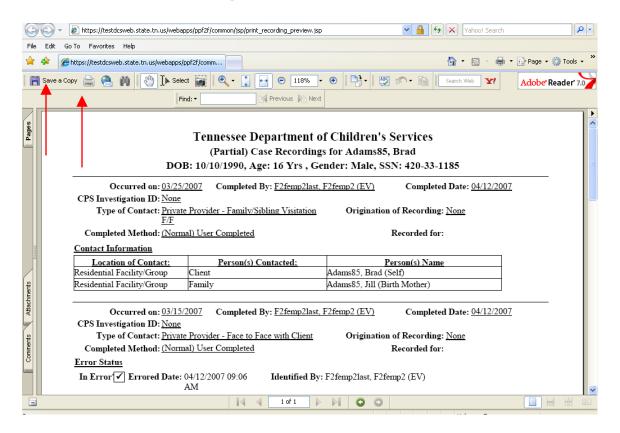
Note: In Error recordings are included in the list for possible printing.

Print Case Recordings - continued



Select the recordings to print using the Select All/Deselect All buttons or the checkboxes to choose individual recordings. Click "OK" to continue.

Print Case Recordings - continued



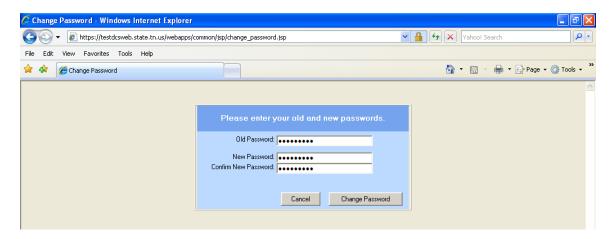
The selected recordings are displayed in a PDF format document. This document can be saved for later printing using the "Save a Copy" button in the upper left hand corner. To print the document now, click either the icon of the printer in the toolbar or use the File/Print option from the menu bar.

Change Password



To change your password, click the "Change Password" link on the home page.

Change Password - continued



Enter your old password. Enter your new password and confirm by entering it a second time. Click "Change Password" to finish the process.

Appendix I

Types of Contact for Vendor Case Recordings Definitions

Face To Face-This is used when a person directly involved in case management makes actual, physical face to face contact with the designated person[s]. Incidental contacts with persons who are not recurring, and who are not significant parts of the case, do not need to be added to the case.

Family/sibling Visitation-Face to Face-This is used when a client visits with a sibling or other family member (such as a parent or other relative) and a case manager or other case management staff who meet the requirements for face to face are also present for the visit.

Family/sibling Visitation-NOT Face to Face-This is used when a client visits with a sibling or other family member (such as a parent or other relative) and a case manger or other case management staff are NOT present for the visit. This may be used when DCS support staff or contract provider staff provides supervision

Appendix II

WEB APPLICATION ACCESS & TRAINING REQUEST

E-mail to: Anna.F.Modena@state.tn.us Fax: 615-532-2263

TYPE OF ACCESS REQUESTED					
TNKIDS FINANCIALS		TNKIDS FINANCIALS		TNKIDS	
DCS PROVIDER INVOICING		DCS PROVIDER PLACEMENT CHANGE		FACE-TO-FACE VISITATION	
TNKIDS FINANCIALS DCS SIR (SERIOUS INCIDENT REPORTING)		PROVIDER REQUEST TO TERMINATE AN EMPLOYEE'S ACCESS (Only check this box if you wish to terminate an employee's access)		TNKIDS ESOURCE HOMES	
DCS INTRANET ACCESS (Provides access to DCS' intranet for current forms and other information)					
AGENCY CORPORATE NAME:					
FIRST NAME:					
MIDDLE INITIAL:					
LAST NAME:					
TITLE:					
SOCIAL SECURITY #:					
PHONE NUMBER:					
FAX NUMBER:					
E-MAIL ADDRESS:					
MALE:		FEMALE			
Training Questions:					
				YES NO	
Is training needed for the operation of the system?					
SIGNATURE OF AGENCY HEAD:					
PHONE NUMBER: () DATE:					